

## Supporting Your VISTA Project & Region

Navigating eGrants & VISTA Recruitment



Welcome to Supporting Your VISTA Project & Region. The second section of your Virtual Leader Orientation training.

In the previous training – "The Basics for VISTA Leaders" - you gained a deeper understanding of the VISTA Leader role and how that fits into your project structure & AmeriCorps VISTA as a whole.

The information in this next training will build on that understanding by providing you with a foundation of knowledge and skills to help you support your VISTA project. This video starts you off with an introduction to the CNCS eGrants system and your role in VISTA Recruitment. [[Next Slide]]

## Learning Objectives



- Navigating eGrants
- Appropriate eGrants Activities for Leaders
- Using eGrants for VISTA Recruitment
- · Building Recruitment Capacity



By the end of this training video you'll know more about:

- [[Click]] Navigating the eGrants system
- [[Click]] Identifying appropriate project support activities for Leaders in eGrants
- [[Click]] Utilizing the eGrants Portal for VISTA recruitment,
- [[Click]] And building the capacity of your project or region to recruit strong VISTA candidates. [[Next Slide]]

#### **Action Items!**



#### Recommended Prep Work:

- Find out if you need access to the eGrants system.
  - · Your organization's EIN
- Ask your supervisor if your project has a written recruitment plan.
  - If yes, take some time to review this document and have a copy on hand for reference during this training.
- Have a copy of your VISTA Leader Assignment Description (VLAD) ready for review.

Addressing these items before you move forward will help you get the most out of this Virtual Leader Orientation training!

Before we move ahead, let's pause for a second to address a few important Action Items:

- Do you know if you need access to the eGrants system?
  - If you do find out your organization's EIN of Employer Identification Number. You'll need this to create an eGrants account.
- Does your project have a written recruitment plan?
- Do you have a copy of your VISTA Leader Assignment Description, or VLAD, available for review during this training?

[[Click]] The answers to the questions on this slide will help you engage more fully with this training. If you don't know these answers or have copies of these documents – we recommend pausing the training here to complete this prep work. Once you're ready, come back and continue with the training. [[Next Slide]]



Our first learning objective, is introducing you to supporting your project or region through the eGrants system. **[[Next Slide]]** 

## Introducing eGrants

#### What is eGrants?

- · Online System
- Automates the grants and project management process.
- VISTA project sponsors use eGrants for almost all grant and member management functions.

#### What does a leader do in eGrants?

- · Use the eGrants Portal
- · Support project recruitment functions
- · Limited activity.



#### The first question we need to answer is "What is eGrants"? [[Click]]

eGrants is an online system designed to automate the entire grants and project management process from application to closeout. VISTA project sponsors use eGrants to submit applications, create amendments, complete required Project Progress Reports, manage member actions, and many other grant functions.

Our second question is "What does a Leader do in eGrants"? [[Click]]

As a VISTA Leader your role in eGrants will involve the part of the system that serves as the gateway to using the eGrants Portal functions for recruitment. These functions will be used within eGrants, but also connect to the My AmeriCorps Member Portal [[Click]] which you should be familiar with through your own process of applying for and becoming a VISTA Leader.

One important thing to note about VISTA Leaders and eGrants is that your activity in this system is very limited. Your role as a VISTA Leader is not to manage your project's eGrants account – eGrants is a tool that you will use to

support your project. We'll discuss this further in the next slide. [[Next Slide]]



All eGrants actions taken by VISTA Leaders occur in the part of eGrants that interfaces with the My.AmeriCorps Portal (again you should be familiar with the My.AmeriCorps Portal from your own member experience). In eGrants – this section is called the "Portal Home." [[Click]]

VISTA Leaders gain access to the Portal Home by being assigned the "Grantee Recruiter" Role. This is the ONLY role that can be assigned to VISTA Leaders in eGrants.

VISTA Leader activity may be limited in eGrants, but it can be critical to successful project recruitment. VISTA Leaders are allowed to take the following actions in eGrants:

- [[Click]] Update (but not submit) Service Opportunity Listings to reflect new recruitment deadlines or add new, more eye-catching language.
- **[[Click]]** Review submitted applications to help inform your project's applicant selection process.
- [[Click]] Search for potential applicants, and send invitations to apply to qualified individuals through the "Search Potential Applicants" function.

Remember. **[[Click]]** These recruitment support functions are the only allowable eGrants Leader activities. **[[Next Slide]]** 



Again, all All eGrants actions taken by VISTA Leaders occur in the "Portal Home." [[Click]]

VISTA Members cannot take actions on the [[Click]] "Account Statements" or [[Click]] "Grants/Application" pages.

Similarly, VISTA Leaders must have their own eGrants account with the assigned "Grantee Recruiter" role, and cannot be given additional Roles in eGrants – such as "Grantee" or "Grantee Administrator."

Remember that you must use your own eGrants account. You cannot share an account with your Supervisor or other project staff.

Some common eGrants actions that VISTA Leaders are NOT allowed to perform are:

- [[Click]] Completing or Submitting Project Progress Reports
- Completing or Submitting Federal Financial Reports

- Completing or Submitting Project Applications or Amendments
- Submitting VADs, Service Opportunity Listings or V-81 Insurance Forms
- Recommending Applicants for Service
- Completing Future Plans Forms or Sponsor Verification Forms

This is not an exhaustive list. If you have been assigned to complete any of these unallowable eGrants activities or any other activities not included on the previous slide, [[Click]] arrange a time to meet with your Supervisor and be removed from these responsibilities. If necessary, reach out to your CNCS State Office for additional support. [[Next Slide]]

# Action Item: Creating an eGrants Account OMMUNITY FRVICE eGrants

- Download the Internet Explorer 11 browser or later.
- Navigate to <a href="https://egrants.cns.gov/">https://egrants.cns.gov/</a> using Internet Explorer.
- Select "Don't have an eGrants account? Create an account."
- Follow the instructions in "Creating an eGrants Account."
- Your account will need to be activated by your "Grantee Administrator."

Now that you know what is and isn't allowed for Leaders in eGrants, here are a few tips for creating an eGrants account.

- Download the Internet Explorer 11 browser. eGrants is a legacy system for CNCS, and that means that some of the system functionality doesn't work correctly in newer browsers like Chrome, Safari or Firefox. If you can't download Internet Explorer into your organization's computer without approvals, be sure to talk to your Supervisor about arranging time to meet with your IT department to get set up with this browser.
- eGrants can be found at https://egrants.cns.gov. You'll see this linked in the resources below this video
- Once you're on the homepage you'll select the link "Don't have an eGrants account? Create an account." [[Click]]
- Then follow the instructions and screenshots provided in the "Creating an eGrants Account" resource located below this training video.
- After you complete the account set-up process, your account will need to be activated by your "Grantee Administrator." This may be your supervisor or another member of staff at your organization. They'll receive an automated e-mail directing them to activate your account, but it never hurts to follow-up.

You can pause the training & set up your account now using the "Creating an eGrants Account" resource, or continue to the end. You don't need an active eGrants account to complete this Virtual Leader Orientation training. [[Next Slide]]



Now that you have a better understanding of eGrants and your role as a Leader in that system, the next section switches focus to your role supporting VISTA Recruitment and the Marketing of your project's or region's VISTA positions. This process involves eGrants, but has many other steps along the way. This section will introduce each step and your role as a Leader in each. [[Next Slide]]



In "The Basics" training you learned about the Six VISTA Leader Roles – The Ambassador, The Mentor, The Recruiter, The Educator or Facilitator, The Liaison & The Resource Generator.

In this section, two of those roles take center stage:

[[Click]] The Recruiter; because you'll be actively recruiting VISTA candidates, and [[Click]] The Ambassador; because successful recruitment requires actively promoting your projects and organization to the wider community.

The skills you develop as a Recruiter and an Ambassador are going to help you effectively:

- Create or implement a recruitment plan for your project's VISTA positions including high quality Service Opportunity Listings
- Engage in marketing and outreach to share these VISTA opportunities with possible applicants in your community and beyond, and
- Identify high-quality candidates that are a best fit for both the VISTA position and

your project's Mission.

Before we dive into discussing VISTA recruitment, let's take a moment to look at your VISTA Leader Assignment Description, or VLAD. Are any of your assigned activities related to recruiting VISTA members or marketing your project? Pause the video here and find out. Then come back to continue the training with a focus on how this information might help you in your particular assignment. [[Next Slide]]

## Building a VISTA Recruitment Plan



- Why build a VISTA recruitment plan?
  - VISTA recruitment involves many different activities.
    - Keeps the process organized & prevents missing steps
    - · Helps everyone understand their roles and responsibilities
    - Tracks progress
- What does a recruitment plan look like?
  - A calendar
  - A spreadsheet
  - A flowchart
  - A "How-To" guide & resources
  - · A combination of these things!



Successful recruitment depends on a number of different activities – posting Service Opportunity Listings, organizing marketing strategies, arranging outreach activities, reviewing applicants, conducting interviews, and choosing candidates.

Having a VISTA recruitment plan in place can build the foundation for successful recruitment by:

- Keeping the process organized and preventing key steps from being overlooked
- Helping the members of your team (yourself, your Supervisor, the Project Director, and other project staff) understand their roles and responsibilities in the process.
   And,
- By tracking the progress being made toward the goal of recruiting high-quality candidates to serve with your project in your community.

#### [[Click]] But what exactly is a recruitment plan?

That depends on the needs of your project, and the working styles of your team. A recruitment plan could be as simple as a shared calendar with key recruitment dates, a spreadsheet to track applicants to each of your VISTA positions, or a flowchart illustrating the recruitment process. Or it can be a detailed guide to your project's

recruitment process with accompanying resources that combine all of these things!

Be sure to review the Recruitment Planning Resources below this video, including:

- The "Your Best Recruitment Season" webinar which walks through the planning, development & execution of a successful recruitment season, and
- The "Recruitment of VISTA Candidates Quick Guide" which offers a compendium of questions and considerations to help you jumpstart effective recruitment strategies.

After this training, use these resources to begin planning what type of VISTA Recruitment Plan might best serve your project or region.

If your project already has a recruitment plan in place, you can use the tools and best practices in this section to update and strengthen the plan as needed. [[Next Slide]]

Now, let's consider the first item that's necessary for any successful VISTA recruitment process.

## **VISTA Service Opportunity Listings**





#### What are Service Opportunity Listings?

- "Job Postings" of National Service
- Based on the activities in the approved VISTA Assignment Description (VAD)
- All interested individuals must apply through the Service Opportunity Listing

Service Opportunity Listings. You've seen one before, you've even used one to apply for a VISTA position, but what exactly are they and how do they get onto My.AmeriCorps.gov?

Service Opportunity Listings are the "job postings" of National Service. Depending on the needs of your project the Service Opportunity Listings may be created or updated by you, or your supervisor, in eGrants, but they must **always** be submitted by your Supervisor or Project Director. Your CNCS Program Officer will then review the Service Opportunity Listing, before it is posted on the My.AmeriCorps.gov recruitment Portal.

Listings are based on the activities in the approved VISTA Assignment Description, or VAD, and will allow individuals to learn more about the VISTA positions at your organization.

Most importantly, the Service Opportunity Listing is where all interested individuals **must** apply to your project's positions. **[[Next Slide]]** 

## **Creating & Updating Listings**



- Create a compelling "two-line teaser."
- Speak to your prospective applicant!
  - Don't say "The VISTA member will..."
  - Instead use "As our VISTA member you will..."
- Be honest, but highlight the benefits.
  - AmeriCorps VISTA benefits & those specific to your organization.



Serving at an Intermediary Project or as a Regional leader?

Share an Opportunity Listing template with your sub-sites or regional projects to ensure high-quality Listings.

You've probably noticed that the My.AmerCorps Portal is fairly plain. The format makes it easy to read all of the important information on one screen, but it doesn't provide you with any ways to promote your position visually. Like with your organization's logo or an engaging photo.

So when it comes to Service Opportunity Listings, getting people interested is all about the words you choose & how you use them. This is your opportunity to get prospective applicants engaged in your organization's mission & excited about how they can make a difference as your VISTA member.

The VISTA Campus has three great resources for creating Opportunity Listings:

- The "Guide to Creating an AmeriCorps VISTA Service Opportunity Listing" provides step-by-step guidance on entering Listings into eGrants.
- The "Crafting a Compelling Service Opportunity" and "Strengthening VADs and Service Opportunities" webinars provide a wealth of tips and best practices for creating your organization's strongest Listings yet!

We highly suggest you take a look at these resources linked below this video, but

#### here are a few quick tips:

- Every Listing opens with a "two-line teaser." You only have 200 characters so make every one of them count.
- Help the applicant imagine themselves serving in your position. Instead of saying "The VISTA member with Friendship Organization will create a mentorship program." try "As our Youth Engagement VISTA member you will engage with our community partners to visualize and create a program to match mentors with Friendship program youth."
- Be honest. It's important to be up front with your applicants about the living allowance amount and the required year-long service commitment. But don't forget to highlight benefits like the Segal AmeriCorps Education Award, Federal Non-Competitive Eligibility, and any others that your organization can provide.
  - Does your organization have a fitness component (like the YMCA?). Can you offer a free membership to your VISTA?
  - Have your Board members secured a low-cost housing opportunity for your VISTA? Be sure to share it! Housing can be one of the biggest hurdles to successful recruitment.

**[[Click]]** Some of you are serving as Leaders for Intermediary Projects or geographic regions. Consider sending a template for Opportunity Listings to your sub-sites or regional projects. A template will help to ensure consistency and high-quality across your project(s)'s Listings. **[[Next Slide]]** 

## Marketing Your VISTA Positions



#### Where is your project's ideal candidate from?



Creating and posting engaging Opportunity Listings is only the first step of successfully marketing your VISTA positions. Before we talk about some of the ways to promote your VISTA positions, we need to answer an important question. [[Click]]

Where is your project's ideal candidate from?

Some VISTA projects are committed to engaging applicants from their local communities, while other projects cast their recruitment net more widely – marketing to applicants from across the country. [[Click]] Answering this question will be the first step in deciding how to market your VISTA positions.

Projects looking for local candidates might focus their recruitment efforts on:

- Doing outreach to community colleges,
- Creating physical marketing like flyers in popular community locations or print ads in the local papers
- Presenting on local radio and local access TV
- Posting positions on community job boards, or doing outreach to employment assistance organizations, or
- Researching nearby AmeriCorps programs who may have members interested in

doing a second year of national service as an AmeriCorps VISTA.

While projects interested in applicants from across the country might focus on:

- Promoting their positions at larger colleges and universities
- Having a presence on job or volunteer search sites with a national reach like Idealist, Indeed or LinkedIn
- Posting on subject specific job boards for individuals with interests that align with the project's focus area – like food justice, non-profit management, or college readiness; or
- Highlighting VISTA positions on their organization's website.

Remember, these are just a few of the ways you might market your VISTA project's positions as a VISTA Leader, and some of these approaches could easily be used to reach either local or national candidates. What's most important is that you approach marketing your positions intentionally, with specific goals in mind.

Regardless of whether you're looking for local candidates or national ones – there's one marketing tool that any VISTA project can engage to increase the reach of their recruitment... [[Next Slide]]

#### Social Media!



- Direct Recruitment Posts: "Apply Now!"
- Indirect Recruitment Posts: Share an engaging video/photo or a blog post.
- Best Practices
  - · Always link your Opportunity Listings
  - Always tag the AmeriCorps VISTA & National Service accounts
  - Always tag your State Office (if applicable)

#### AmeriCorps VISTA & National Service on Social Media

Twitter: @AmeriCorpsVISTA @nationalservice Facebook: @AmeriCorpsVISTA @nationalservice

Instagram: @nationalservice

YouTube: <a href="https://nationalservice.tumblr.com/">www.youtube.com/nationalservice</a>
<a href="https://nationalservice.tumblr.com/">https://nationalservice.tumblr.com/</a>



#### Social Media!

As a recruitment tool – social media can provide you with great opportunities to reach new potential applicants in a variety of ways:

- Direct recruitment posts; Tell people you're recruiting for new VISTAs & share the link to your Opportunity Listings.
  - The "pros" of this method are that it's very straightforward, quick & easy.
  - "Cons" are that people who aren't already looking for a VISTA position or don't know about your organization might not be interested enough to engage with the post.
- Indirect recruitment posts; Share an engaging video or photo that tells the story of your organization, or have a current VISTA member, volunteer or staff person write a blog post or service story highlighting the work of your organization
  - The "pros" of this method are that it's more unique, provides more information about your organization, and adds a human interest element.
  - However, these types of posts are more time consuming, and require potential applicants to engage with content for a longer time before getting to the "Apply Now" message.

Consider the social media capacity of your project before deciding what types of engagement make the most sense for your recruitment plan, and try to follow these three best practices:

- Always link back to your Opportunity Listings (this is how people can apply!)
  - Always tag the AmeriCorps VISTA and National Service accounts
- Most CNCS State Offices also have a social media presence if yours does, be sure to tag them as well. Many State Offices will like, share & retweet their projects' recruitment posts.

Now that you have a better idea of how you might approach marketing your project or region's VISTA positions, check out the Marketing & Social Media Resources links below this video:

- The "AmeriCorps VISTA Outreach Materials" provide guidance, examples, and templates for a variety of visual VISTA marketing,
- A quick list of recruitment ideas can be found in "Getting the Word Out: Inclusive Recruitment Avenues."
- The "Leveraging Digital Marketing to Promote your Opportunity Listings" webinar provides tips and tricks to generate the most interest in your Opportunity Listings,
- Chapter 15 of the VISTA Member Handbook includes guidance on the "do's and don'ts" of social media for all VISTA members and leaders; and
- The "Using Social Media Resources" page of the VISTA campus includes even more tools to get you started.

Once you've created an Opportunity Listing, marketed the position & started community outreach; you need to start thinking about how your project will communicate with the people who apply to your position. [[Next Slide]]

## Finding the Right Candidate





- Your Applicant Finds You
- You Find Your Applicant
- Create a Communication & Interview Protocol
  - Who conducts which parts of the communication and interview process?
  - Do you request a resume and writing sample?
  - Do you conduct an informational interview?

Important! As a VISTA leader, you must conduct formal interviews with the Project Director; you cannot make selection decisions, or complete the Sponsor Recommendation in the eGrants Portal.

There are two ways that the eGrants My. AmeriCorps Portal is going to help you identify and reach out to applicants.

The first, is with applicants who find you, and apply directly to your positions through the Service Opportunity Listing. These candidates will appear in your Recruitment Workbasket along with their full application.

The second way, is by connecting you with applicants who have created an application and applied to other positions, but haven't found you yet! You can communicate with these applicants by searching for them in the eGrants My.AmeriCorps Portal.

 In the resources below this video you'll find "Searching for Applicants in My.AmeriCorps" – this will give you a step-by-step guide to utilizing this process.

Once applicants begin applying to your project's positions you should start implementing a screening, communication and interview protocol. Your project may already have these processes set up, but if not, or if they could use an update be sure you know the answers to these questions:

- Who is responsible for each part of the communication, interviewing and selection process? You, your Supervisor, your sub-site, or project partners?
- Does your project require a resume, writing sample, or other supplemental documents?
- Will you, as the VISTA Leader, be conducting an informational interview before a formal interview in scheduled?
  - An information interview involves ensuring that the applicant understands the requirements and benefits of VISTA service, and answering any questions that the applicant may have. These informational discussions can be important if you have a large number of applicants to ensure that formal interviews are only scheduled for applicants who understand what a VISTA service year requires and are prepared to make the commitment. VISTA Leaders may conduct informational interviews without the participation of their supervisor or project director.

You'll also find great resources and tools linked below to get you started:

- "Screening VISTA Applicants" provides an outline of how you and your project can begin to narrow the field of applicants toward those who might be the best fit for your position.
- "Interviewing VISTA Applicants" gives an introduction to the best kinds of questions to ask potential candidates, and what questions you're not legally allowed to ask.
- If your project attracts a large number of VISTA applicants, or if you are a VISTA
   Leader for an Intermediary Project or Geographic region you and your supervisor
   will have a lot of information to keep track of. You might use the "AmeriCorps
   VISTA Applicant Tracking Tool" linked below or something similar to keep the
   process running smoothly.

[[Click]] Remember! While VISTA Leaders may participate in the formal interview process they must be conducted with project staff (such as the Supervisor or VISTA Project Director). Additionally VISTA Leaders cannot make selection decisions, or complete the Sponsor Recommendation Form to recommend an applicant for service in the eGrants Portal. [[Next Slide]]

## **Keeping Candidates Engaged**



- Invite them to attend organizational events
- Send background reading
- Connect them with currently serving VISTAs
- · Assist them with finding housing
- Introduce other services in your community.
- Encourage them to join your social media sites.
- Check in on a weekly basis
  - Ensure that documentation is turned in on time.



Once your project's recommended candidates have been approved by CNCS for service – it's important to keep your candidates engaged until they officially begin their VISTA service year.

Some strategies for engaging your candidates in the lead up to their service year are:

- Invite them to attend events, meetings or gathering at your organization if they are local or relocating before service.
  - Be sure your candidate understands that these pre-service meetings are voluntary and that they will not count toward their service year or receive a living allowance payment for attending them.
- Send helpful readings, new articles or other information that can help them prepare for their VISTA position
- Connect them with other VISTA members who may be currently serving at your organization or in your geographic region.
- If your candidates are relocating, provide assistance in finding housing or other services.
- Send links to your organization's social media sites and encourage them to follow you.

- There are a number of pre-service documents and forms to be completed prior to VISTA service follow up on a weekly basis to ensure that these are being completed in a timely manner.
  - It's important that if a candidate is not being responsive to these necessary pre-service steps that you bring these issues to the attention of your supervisor as soon as possible.

[[Next Slide]]

## Let's Review!



Vista will send 6000 volunteers to one country this year.



- Navigating eGrants
- Appropriate eGrants Activities for Leaders
- Using eGrants for VISTA Recruitment
- Building Recruitment Capacity

Let's review the new information that you've received during this training to better support your project in eGrants and through the recruitment process. You now know more about:

- [[Click]] The eGrants system and how to navigate it.
- [[Click]] Your allowable roles and activities in eGrants.
- [[Click]] How to best use the eGrants Portal to support successful recruitment for your project, and
- [[Click]] Some approaches to building the capacity of your project or region to recruit strong VISTA candidates. [[Next Slide]]

## Up Next!









Thanks for engaging with us to learn more about the eGrants systems and VISTA recruitment! Once you're ready to move on to the next topic scroll down to "VISTA Project Performance Measurement."

Remember you can always come back to this video, reference the slides in the PDF version linked below, and use the other resources in this section whenever you need them!